

SIS 2000+ Training Manual

Entering Food Service Items

Purpose

This program is used to enter food items into the system. Two type of food items are used in Food Services:

1. Meal Items, which may be Lunch, Breakfast, or Milk (if Milk is treated as a potentially reimbursable item *and* a rate has been set in the Rates module).
2. ala Carte items

If a food item is identified as a Meal Item, then that food item uses pre-defined rates as present in the Rates module. It is a *potentially* reimbursable item (based upon the consumer). Meal Item sales appear on Detail and Summary Meal reports.

A Meal Item also has an additional capability. You may choose to override preset Meal Rates and assign an Override Rate to a specific Meal Item, designating specific consumer types to whom the override rate applies.

Ala Carte food items *do not* reference Rates for the price. Each ala Carte item requires a price to be specified in Items. Ala Carte items sales appear in Detail and Summary ala Carte reports.

Food Item availability may be set as District-wide, per School Type, per School, and per Meal. Items utilize Rate Change records, which permits prices to change mid-year while retaining historical reporting accuracy.

Important** If *Replication* is to be implemented, **Rates** and **Items** **MUST** be completed using the District-wide database only.

Prerequisites

Meal Rates must be present in the Food Service Rates module.

Training Objectives

Enter Meal Items
Enter ala Carte Items
Enter ala Carte Item prices
Understand Item Rate Change records
Understand how to change an Item rate mid-year
Create an Override Meal Rate Item. Understand when this type of Item is appropriate
Create Banquet Sales/Catering ala Carte Item

Accessing Food Service Items

From the SchoolNet Main Menu, click on the Food Service button. From the Food Service menu, click on the **Items** button (or Alt-I on the keyboard).

For further information refer to Help:

Available through the NeTel website at:
<http://www.netel.com/webdoc/default.htm>

Tasks

Enter a Meal Item

Click on the **New** button from the Items screen. Use tab to move to each field.

Set **Item type** to Lunch, Breakfast or Milk

(use Milk only if Milk is present in Rates as a potentially reimbursable Item)

Enter **Item Description**. This is a user-defined text entry and appears on reports.

Limit Availability –

Location determines if this meal is available district-wide, per School type, or per School

Meal(s) determines at which meal this item is available. Choices are *Lunch*, *Breakfast* or *Unset*, which makes the item available at all meals.

Save

Consumer	Effective	Expire	Rate 1	Rate 2	Worker	Chg by	Chg date

Fig. 1 – Meal Item

Enter an ala Carte Item

Click on the **New** button from the Items screen. Use tab to move to each field.

Set **Item type** to ala Carte

Enter **Item Description**. This is a user-defined text entry and appears on reports.

Limit Availability –

Location determines if this item is available district-wide, per School type, or per School

Meal(s) determines at which meal this item is available. Choices are *Lunch*, *Breakfast* or *Unset*, which makes the item available at all meals.

Complete ala Carte Pricing (see below)

The screenshot shows the 'SchoolNet C/S Food Service Items' window. At the top, there is a menu bar with 'File' and 'Help', and a date field showing 'Date: 08/10/1998'. Below the menu bar, the 'Limit Availability' section contains two dropdown menus: 'Location(s)' set to 'High School (all)' and 'Meal(s)' set to 'Lunch'. The 'Item type' dropdown is set to 'Ala Carte', and the 'Item Description' text field contains 'Nachos'. Below this, the 'Ala Carte Pricing:' section features a table with columns: Effective, Expire, Student, Faculty, Adult, Child, Chg by, and Chg date. The table is currently empty. Below the table are 'Add' and 'Remove' buttons. At the bottom of the window is a toolbar with buttons for navigation and actions: 'Print', 'Find', 'List', 'Delete', 'Undo', 'New', 'Save', and 'Quit'.

Effective	Expire	Student	Faculty	Adult	Child	Chg by	Chg date

Fig. 2 – ala Carte Item, type, description and availability

Enter ala Carte Item price

The screenshot shows a window titled "SchoolNet C/S Food Service Items" with a menu bar (File, Help) and a date field (Date: 08/10/1998). Below the menu bar, there are two rows of input fields. The first row has "Item type" (Ala Carte) and "Item Description" (Nachos). The second row, under the "Limit Availability" header, has "Location(s)" (High School (all)) and "Meal(s)" (Lunch). Below these fields is a section titled "Ala Carte Pricing:" containing a table with 8 columns: Effective, Expire, Student, Faculty, Adult, Child, Chg by, and Chg date. The first row of the table is populated with the following values: Effective: 08/24/1997, Expire: (empty), Student: 1.00, Faculty: 1.25, Adult: 1.25, Child: 1.00, Chg by: AdmSy, Chg date: 08/10/1998. Below the table are "Add" and "Remove" buttons. At the bottom of the window is a row of navigation buttons: Print, End, List, Delete, Undo, New, Save, and Quit, flanked by left and right arrow buttons.

Effective	Expire	Student	Faculty	Adult	Child	Chg by	Chg date
08/24/1997		1.00	1.25	1.25	1.00	AdmSy	08/10/1998

Fig. 3 – ala Carte Item with price

Click on the **Add** button (Ala Carte Pricing). Use the Tab key to move through the fields.
Enter Effective/Expire Dates
Enter the price for this item for a Student, a Faculty, a Visiting Adult and a Visiting Child
Save

Understand Item Rate Change Records

The screenshot shows the 'SchoolNet C/S Food Service Items' window. At the top, there is a menu bar with 'File' and 'Help', and a date field showing '08/10/1998'. Below the menu bar, there are several input fields: 'Item type' set to 'Ala Carte', 'Item Description' set to 'Nachos', 'Location(s)' set to 'High School (all)', and 'Meal(s)' set to 'Lunch'. A section titled 'Ala Carte Pricing:' contains a table with the following data:

Effective	Expire	Student	Faculty	Adult	Child	Chg by	Chg date
08/24/1997	08/31/1998	1.00	1.25	1.25	1.00	AdmSy	08/10/1998
09/01/1998		1.00	1.00	1.00	1.00	AdmSy	08/10/1998

Below the table are 'Add' and 'Remove' buttons. At the bottom of the window is a row of navigation buttons: 'Print', 'End', 'List', 'Delete', 'Undo', 'New', 'Save', and 'Quit'.

Fig. 3 – Complete ala Carte Item, rate change records present

Rules for Item Rate Change Records:

All food Items use Rate Change Records to establish specific time frames (*effective and expire dates*) for each rate. This allows rates to change mid-year without affecting historical reporting, and also maintains a history for each rate. A **Meal** Item references Rate Change Records present in the Rates module. An **Override Rate Meal** Item references Rate Change Records present in the Items module.

The following applies to **Rate Change Records**:

Effective and *Expire* Dates are **not** required unless a rate changes. If these dates are not present, the system assumes the rate is in effect.

If a rate changes, only the *Expire* Date is required to close the current rate. The *Effective* Date is optional.

To place a new rate in effect, only the new *Effective* Date is required. The *Expire* Date for the new rate is optional.

It is recommended that both the *Effective* and *Expire* Dates are included when an Item rate is entered to promote consistency and to avoid inadvertently using an incorrect rate at the start of a new school year. Also, assigning both dates to a rate produces concise Items Rates Reports with clearly defined periods of coverage for each rate (Fig. 3).

How to change an Item Rate mid-year

Locate Item

Click on the **Find** button to run the Find Item utility

Locate the food Item

Click on the **Edit** button

Close current rate by entering an Expire Date

Click on the **Add** button

Complete the new rate

Effective Date

Expire Date

New Student, Faculty, Adult, Child prices

Save

Create an Override Meal Rate Item - Override the Pre-defined Meal Rate

Create a Meal Item (see Enter a Meal Item, Fig. 1)

Complete **Override Meal Pricing**

Click on the **Add** button (Override Meal Rates grid) to activate a rate row

Select **Consumer Type** for this item. An Override Meal Rate Item may contain multiple consumer types (Figs. 4, 5).

Complete **Effective/Expire** Dates

Complete Rate 1, Rate 2 and Worker Rate for this consumer type. This Override Rate meal will reference these rates and effective dates, instead of using the rates present in the Rates module.

Click on **Add** again if you need to create a rate for an additional consumer type

Click on the **Save** button

Create an Override Meal Rate Item - Override the Pre-defined Meal Rate
(continued)

SchoolNet C/S Food Service Items
File Help Date: 08/10/1998

Item type: Lunch Item Description: Adult Carryout Lunch
Limit Availability: Location(s): Middle School (all) Meal(s): Lunch

Override Meal Rates:

Consumer	Effective	Expire	Rate 1	Rate 2	Worker	Chg by	Chg date
Faculty		03/31/1998	2.00	2.00	2.00	AdmSy	03/31/1998
Faculty	04/01/1998		2.25	2.25	2.25	AdmSy	03/31/1998

Add Remove

Print End List Delete Done New Save Quit

Fig. 4 – Override Meal Rate, single consumer type, rate change records present

SchoolNet C/S Food Service Items
File Help Date: 08/10/1998

Item type: Lunch Item Description: Adult Chef Salad
Limit Availability: Location(s): High School (all) Meal(s): Lunch

Override Meal Rates:

Consumer	Effective	Expire	Rate 1	Rate 2	Worker	Chg by	Chg date
Faculty			2.75	2.75	2.75	AdmSy	08/10/1998
Adult			2.75	2.75	2.75	AdmSy	08/10/1998
Child			2.75	2.75	2.75	AdmSy	08/10/1998

Add Remove

Print End List Delete Done New Save Quit

Fig. 5 – Override Meal Rate, multiple consumer types, no Rate Change Records present

Create a Banquet Sales/Catering ala Carte Item

This procedure produces a generic ala Carte Banquet Sales Food Item to permit flexible pricing. More than one item of this type may be present if each item name is unique. You may wish to create a *Banquet Sales* item and a *Concessions* item for example.

Click on the **New** button

Complete Item Information

Item type set as ala Carte

Item Description (ex. Banquet Sales or Catering)

Limit Availability

Location(s) as appropriate

Meal(s) set as Unset

Complete ala Carte Pricing

Click on the pricing **Add** button

Omit **Effective/Expire** Dates

Prices - Student, Faculty, Adult & Child prices for this item remain as "**0.00**". The "each" price of a Banquet Sales item is determined when service is recorded in Volume Sales (Cafeteria module).

Save

The screenshot shows the 'SchoolNet C/S Food Service Items' window. At the top, there is a menu bar with 'File' and 'Help', and a date field showing '08/10/1998'. Below the menu bar, there are four input fields: 'Item type' (set to 'Ala Carte'), 'Item Description' (set to 'Banquet Sales'), 'Location(s)' (set to 'District-wide'), and 'Meal(s)' (set to '<Unset>'). Below these fields is a section titled 'Ala Carte Pricing:' which contains a table with columns: 'Effective', 'Expire', 'Student', 'Faculty', 'Adult', 'Child', 'Chg by', and 'Chg date'. The first row of the table has values: 'Effective' (empty), 'Expire' (empty), 'Student' (.00), 'Faculty' (.00), 'Adult' (.00), 'Child' (.00), 'Chg by' (AdmSy), and 'Chg date' (05/27/1998). Below the table are two buttons: 'Add' and 'Remove'. At the bottom of the window is a row of buttons: 'Print', 'Find', 'List', 'Delete', 'Done', 'New', 'Save', and 'Quit'.

Effective	Expire	Student	Faculty	Adult	Child	Chg by	Chg date
		.00	.00	.00	.00	AdmSy	05/27/1998

Fig. 6 – Banquet Sales Food Item